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LIEBERMAN & BRANDSDORFER, LLC 802 STILL CREEK LANE GAITHERSBURG, MD 20878			VAN DOREN, BETH	
			ART UNIT	PAPER NUMBER
			3623	

DATE MAILED: 01/30/2006

Please find below and/or attached an Office communication concerning this application or proceeding.

DL

## Office Action Summary

Application No.

09/985,973

Applicant(s)

DVER ET AL.

Examiner

Beth Van Doren

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-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --  
**Period for Reply**

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

### Status

- 1) ☒ Responsive to communication(s) filed on 24 September 2003.
- 2a) ☐ This action is **FINAL**. 2b) ☒ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

### Disposition of Claims

- 4) ☒ Claim(s) 1-56 is/are pending in the application.
- 4a) Of the above claim(s) \_\_\_\_\_ is/are withdrawn from consideration.
- 5) ☐ Claim(s) \_\_\_\_\_ is/are allowed.
- 6) ☒ Claim(s) 1-56 is/are rejected.
- 7) ☐ Claim(s) \_\_\_\_\_ is/are objected to.
- 8) ☐ Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

### Application Papers

- 9) ☐ The specification is objected to by the Examiner.
- 10) ☐ The drawing(s) filed on \_\_\_\_\_ is/are: a) ☐ accepted or b) ☐ objected to by the Examiner.  
Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).  
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

### Priority under 35 U.S.C. § 119

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All b) ☐ Some \* c) ☐ None of:
- ☐ Certified copies of the priority documents have been received.
  - ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
  - ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).
- \* See the attached detailed Office action for a list of the certified copies not received.

### Attachment(s)

- |   |   |
|---|---|
| 1) <input checked="" type="checkbox"/> Notice of References Cited (PTO-892)   | 4) <input type="checkbox"/> Interview Summary (PTO-413)<br>Paper No(s)/Mail Date. _____ |
| 2) <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948)  | 5) <input type="checkbox"/> Notice of Informal Patent Application (PTO-152)             |
| 3) <input checked="" type="checkbox"/> Information Disclosure Statement(s) (PTO-1449 or PTO/SB/08)<br>Paper No(s)/Mail Date <u>20030616, 20040926</u> | 6) <input type="checkbox"/> Other: _____  |

### **DETAILED ACTION**

1. The following is a non-final, first office action on the merits. A preliminary amendment was received on 09/24/03 by which claims 1, 3-4, 6-9, 12-13, 16, 18, 20, 23-27, 32, 34-37, 39, 41-49 were amended and claims 51-56 were added. Claims 1-56 are now pending in this application.

#### ***Claim Objections***

2. Claim 5 objected to because of the following informalities: number agreement. Claim 5 recites "a workflow parameters", where the article "a" does not agree with the term "parameters". This limitation should more appropriately be --a workflow parameter--.

Correction is required.

#### ***Claim Rejections - 35 USC § 112***

3. The following is a quotation of the second paragraph of 35 U.S.C. 112:

The specification shall conclude with one or more claims particularly pointing out and distinctly claiming the subject matter which the applicant regards as his invention.

Claim 1 is rejected under 35 U.S.C. 112, second paragraph, as being indefinite for failing to particularly point out and distinctly claim the subject matter which applicant regards as the invention.

Claim 1 recites the limitation "said workflow" in elements (c) and (d). There is insufficient antecedent basis for this limitation in the claim as element (b) of claim 1 recites "a workflow parameter". Clarification is required. For examination purposes, "said workflow" in element (c) has been construed as --a workflow--.

***Claim Rejections - 35 USC § 102***

4. The following is a quotation of the appropriate paragraphs of 35 U.S.C. 102 that form the basis for the rejections under this section made in this Office action:

A person shall be entitled to a patent unless –

(e) the invention was described in (1) an application for patent, published under section 122(b), by another filed in the United States before the invention by the applicant for patent or (2) a patent granted on an application for patent by another filed in the United States before the invention by the applicant for patent, except that an international application filed under the treaty defined in section 351(a) shall have the effects for purposes of this subsection of an application filed in the United States only if the international application designated the United States and was published under Article 21(2) of such treaty in the English language.

5. Claims 1-16, 18, 21, 23-35, 37, 40, 42-47, 49, and 51-55 are rejected under 35 U.S.C. 102

(e) as being anticipated by Johnson et al. (U.S. 6,067,525).

As per claim 1, Johnson et al. teaches a method for marketing comprising:

(a) creating a record in a database (See column 4, lines 20-51, column 11, lines 15-20, column 13, lines 7-24, column 27, lines 40-50, wherein a record of information about a potential customer is stored in the database of the system);

(b) customizing a workflow parameter for said record (See column 4, lines 35-43 and 52-column 5, line 8, column 15, lines 17-29, column 17, lines 15-25, wherein a record is stored for a potential customer and a workflow for converting that potential customer into a purchasing customer is implemented in the system. Different parameters/features associated with the workflow are customized to make the workflow specific to the customer and the customer's record, such as in the presentation module where the presentation and proposal are specifically tailored to the preferences and needs of the customer);

(c) managing said record in a workflow (See column 2, lines 20-35 and 45-55, column 4, lines 44-65, column 5, line 65-column 6, line 10, column 7, lines 20-27, column 8, lines 35-51, and column 32, lines 35-45, wherein the system manages a customer's record through a

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workflow (sales process), as implemented by the automated system which manages the relationships between all the activities performed by the salespersons); and

(d) acting upon said record in said workflow within a station parameter (See column 2, lines 20-35, column 4, lines 20-42, column 11, lines 3-36, column 19, lines 1-22 and 26-35, column 20, lines 30-52, column 21, lines 1-16, wherein the record of the customer is acted upon in different phases of the sales process. The system has specific ways it automatically deals with events (i.e. processes, series of steps, etc.), such as lead data being entered into the system. These guidelines, or parameters, are set based on data gained about a potential customer. The system moves the customer record through the phases based on the data associated with the record).

As per claim 2, Johnson et al. discloses selecting a subsequent station within said workflow for said record (See column 2, lines 20-35, column 6, lines 30-45, column 8, lines 35-50, column 17, lines 25-38, column 18, lines 37-44 and 55-67, and column 32, lines 36-45, which discloses phases of the workflow of the sales process, wherein events in a first phase cause the system to pass information to the next, subsequent phase of the process).

As per claim 3, Johnson et al. wherein the step of customizing a workflow parameter for said record includes assigning a duration for a record to remain in a station (See column 3, lines 60-67, column 4, lines 12-22 and 52-58, and column 5, lines 30-40, wherein parameters/features associated with the workflow are customized to make the workflow specific to the customer and the customer's record. Each phase of the workflow has specific timing associated with its functionality).

As per claim 4, Johnson et al. wherein the step of customizing a workflow parameter includes defining a subsequent station for a said record (See column 7, lines 40-55, column 18, line 55-column 19, line 15, column 20, lines 30-50, and column 21, lines 10-30, wherein customization of the process and the process steps occurs).

As per claim 5, Johnson et al. discloses wherein the step of customizing a workflow parameter includes creating an action to be conducted by a user upon said record (See column 4, lines 35-43 and 52-column 5, line 8, column 6, lines 30-50, column 15, lines 17-29, column 17, lines 15-25, column 19, lines 45-60, wherein a workflow for converting a potential customer into a purchasing customer is implemented in the system with parameters/features associated with the workflow being customized to make the workflow specific to the customer and the customer's record. Using this customized workflow, a to do list is constructed and the sales person takes action using the customized workflow).

As per claim 6, Johnson et al. teaches compiling a report of said record (See column 13, lines 24-35, column 18, lines 1-15 and 36-45, wherein a report is compiled concerning the customer record, such as concerning customer information, customer orders, etc.).

As per claim 7, Johnson et al. discloses said report includes parameters selected from a plurality of fields of said record (See column 9, lines 45-55, column 13, lines 24-35, column 17, lines 15-25, column 18, lines 1-15 and 36-45, column 20, lines 15-30, and column 26, lines 40-55, wherein the report is customizable and includes only a portion of the overall record associated with a portion of the overall process).

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As per claim 8, Johnson et al. discloses wherein said report is an automatically generated (See column 13, lines 24-35, column 18, lines 1-15 and 36-45, wherein a report is automatically compiled).

As per claim 9, Johnson et al. discloses setting a frequency for generating said report (See column 13, lines 24-35, column 18, lines 1-15 and 36-45, which discloses a periodic report).

As per claim 10, Johnson et al. teaches selecting a medium for communicating said report (See column 20, lines 10-30, wherein a medium is selected for communication).

As per claim 11, Johnson et al. discloses wherein said medium is selected from the group consisting of electronic mail, a print copy, and a hyperlink to a browser page (See column 20, lines 10-30, wherein reports are at least emailed)

As per claim 12, Johnson et al. discloses creating an opportunity within said workflow for marketing a product (See column 4, lines 20-43, column 19, lines 35-46, column 26, lines 54-65, wherein a lead is generated and marketing occurs).

As per claim 13, Johnson et al. teaches wherein said opportunity includes workflow parameters for the product (See column 4, lines 20-40, column 5, lines 13-24, column 11, lines 20-37 and 48-column 12, line 10 and lines 20-40, wherein parameters for the product are presented in the workflow).

As per claim 14, Johnson et al. discloses wherein each record is defined by an originating source (See column 4, lines 24-42, column 7, lines 20-25, column 10, line 60-column 11, line 30, wherein each record is defined at an originating source, such as at a trade show).

As per claim 15, Johnson et al. teaches said source providing a selection of originating stations in said workflow (See column 4, lines 24-42, column 7, lines 20-25, column 10, line 60-

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column 11, line 30, wherein different originating stations exist, such as a kiosk, a purchased database, with a sales person, etc.).

As per claim 16, Johnson et al. discloses wherein the step of customizing a workflow parameter for said record includes amending a station definition (See column 5, lines 30-50, and column 21, lines 15-30, wherein the placement in the workflow is amendable/changeable).

As per claim 18, Johnson et al. teaches removing said record from said database (See column 31, lines 50-65).

As per claim 21, Johnson et al. teaches importing multiple records from an external source (See column 4, lines 24-41, column 23, lines 30-45, and column 24, lines 5-25 and 36-45, wherein records are imported from an external source, such as an external database or a purchased database).

As per claim 23, Johnson et al. discloses a computer system for marketing comprising:  
a database adapted to store at least one record (See column 4, lines 20-51, column 11, lines 15-20, column 13, lines 7-24, column 27, lines 40-50, wherein a record of information about a potential customer is stored in the database of the system);

a customized workflow parameter for said record (See column 4, lines 35-43 and 52-column 5, line 8, column 15, lines 17-29, column 17, lines 15-25, wherein a record is stored for a potential customer and a workflow for converting that potential customer into a purchasing customer is implemented in the system. Different parameters/features associated with the workflow are customized to make the workflow specific to the customer and the customer's record, such as in the presentation module where the presentation and proposal are specifically tailored to the preferences and needs of the customer);



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a workflow to manage said record (See column 2, lines 20-35 and 45-55, column 4, lines 44-65, column 5, line 65-column 6, line 10, column 7, lines 20-27, column 8, lines 35-51, and column 32, lines 35-45, wherein the system manages a customer's record through a workflow (sales process), as implemented by the automated system which manages the relationships between all the activities performed by the salespersons);

wherein said workflow parameter provides instruction of required action on a record (See column 2, lines 20-35, column 4, lines 20-42, column 11, lines 3-36, column 13, lines 5-10, column 19, lines 1-22 and 26-35, column 20, lines 30-52, column 21, lines 1-16, wherein the record of the customer is acted upon in different phases of the sales process. The system has specific ways it automatically deals with events (i.e. processes, series of steps, etc.), such as lead data being entered into the system. These guidelines, or parameters, are set based on data gained about a potential customer. The system moves the customer record through the phases based on the data associated with the record, and provides the salesperson with information on how to act on the record in that phase).

Claim 24 recites substantially similar limitations to claim 2 and is therefore rejected using the same art and rationale set forth above.

As per claim 25, Johnson et al. discloses wherein said workflow parameter defines an action to be conducted upon said record during said duration in a station (See column 2, lines 20-35, column 4, lines 20-42, column 11, lines 3-36, column 19, lines 1-22 and 26-35, column 20, lines 30-52, column 21, lines 1-16, wherein the record of the customer is acted upon in different phases of the sales process. The system has specific ways it automatically deals with events (i.e. processes, series of steps, etc.), the guidelines, or parameters, set based on data gained about a

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potential customer. See column 3, lines 60-67, column 4, lines 12-22 and 52-58, and column 5, lines 30-40, which discuss durations in stations).

Claims 26, 28, and 29 recite substantially similar limitations to claims 6, 8, and 9, respectively, and are therefore rejected using the same art and rationale set forth above.

As per claim 27, Johnson et al. teaches wherein said report includes parameters selected from the field of said record (See column 9, lines 45-55, column 13, lines 24-35, column 17, lines 15-25, column 18, lines 1-15 and 36-45, column 20, lines 15-30, and column 26, lines 40-55, wherein the report is customizable and includes only a portion of the overall record associated with a portion of the overall process).

Claims 30, 31, 32, 33, and 34 recite substantially similar limitations to claims 10, 11, 12, 14, and 15, respectively, and are therefore rejected using the same art and rationale set forth above.

As per claim 35, Johnson et al. teaches wherein said workflow parameter is amendable (See column 5, lines 30-50, and column 21, lines 15-30, wherein the workflow is amendable/changeable).

Claims 37 and 40 recite substantially similar limitations to claims 18 and 21 and are therefore rejected using the same art and rationale set forth above.

Claim 42 recites substantially similar limitations to claims 1 and 2 combined and is therefore rejected using the same art and rationale set forth above.

As per claim 43, Johnson et al. teaches compiling a progress report of said record (See column 18, lines 10-16, column 19, line 60-column 20, line 26, and column 21, lines 40-50, wherein progress information is compiled and viewable concerning the customer record).

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Claims 44 and 45 recite substantially similar limitations to claims 10 and 9, respectively, and are therefore rejected using the same art and rationale set forth above.

As per claim 46, Johnson et al. discloses entering a new record into the database (See column 4, lines 20-51, column 11, lines 15-20, column 13, lines 7-24, column 27, lines 40-50, wherein a new record of a new customer or potential lead is entered).

Claim 47 recites substantially similar limitations to claim 21 and is therefore rejected using the same art and rationale set forth above.

As per claim 49, Johnson et al. teaches adding custom fields to the record (See column 20, lines 35-48, which discuss customized fields associated with said record).

As per claim 51, Johnson et al. teaches an article comprising:

a computer-readable signal-bearing medium (See figure 1-2, column 7, lines 19-40, column 4, lines 20-40, column 5, lines 25-30, column 23, lines 30-40, column 24, lines 1-20,);

means in the medium for customizing a workflow parameter for a record within a database (See column 4, lines 35-43 and 52-column 5, line 8, column 15, lines 17-29, column 17, lines 15-25, wherein a record is stored for a potential customer and a workflow for converting that potential customer into a purchasing customer is implemented in the system. Different parameters/features associated with the workflow are customized to make the workflow specific to the customer and the customer's record, such as in the presentation module where the presentation and proposal are specifically tailored to the preferences and needs of the customer);

means in the medium for managing said record within said workflow (See column 2, lines 20-35 and 45-55, column 4, lines 44-65, column 5, line 65-column 6, line 10, column 7, lines 20-27, column 8, lines 35-51, and column 32, lines 35-45, wherein the system manages a

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customer's record through a workflow (sales process), as implemented by the automated system which manages the relationships between all the activities performed by the salespersons).

As per claim 52, Johnson et al. discloses wherein the medium is selected from a group consisting of recordable data storage medium and a modulated carrier signal (See figure 1-2, column 7, lines 19-40, column 4, lines 20-40, column 5, lines 25-30, column 23, lines 30-40, column 24, lines 1-20, which discloses recordable data storage medium).

As per claim 53, Johnson et al. discloses means in the medium for generating a report of said record within said workflow (See column 13, lines 24-35, column 18, lines 1-15 and 36-45, wherein a report is compiled concerning the customer record, such as concerning customer information, customer orders, etc.).

Claims 54 and 55 recite substantially similar limitations to claims 46 and 49, respectively, are therefore rejected using the same art and rationale set forth above.

***Claim Rejections - 35 USC § 103***

6. The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

7. Claims 19-20 and 38-39 are rejected under 35 U.S.C. 103(a) as being unpatentable over Johnson et al. (U.S. 6,067,525).

As per claim 19, Johnson et al. teaches access control and an administrator system that assigns a user to the database and manages the administration of the users (See column 8, lines

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59-64, column 9, lines 25-35). However, Johnson et al. does not expressly disclose removing a user from said database.

Johnson et al. discloses a sales force automation tool with an administration subsystem that allows a user to be assigned access and manages the administration of the users. It is well-known in the art that administrators via an administration system can assign and delete access rights to systems. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to allow the administrator by the administration subsystem to remove a user from the system in order to increase the integrity of the data by controlling access to said data.

As per claim 20, Johnson et al. discloses that a salesperson has access to a customer's record and has the ability to manage tasks associated with that customer (See column 2, lines 20-35 and 45-55, column 4, lines 44-65, column 5, line 65-column 6, line 10, column 7, lines 20-27, column 8, lines 35-51, column 21, lines 1-12, column 23, lines 1-25, and column 32, lines 35-45, wherein the system manages a customer's record through a workflow (sales process), as implemented by the automated system which manages the relationships between all the activities performed by the salespersons). Johnson et al. further teaches access control and an administrator system that assigns a user to the database and manages the administration of the users (See column 8, lines 59-64, column 9, lines 25-35). However, Johnson et al. does not expressly disclose reassigning said record from said user when a user is removed.

Johnson et al. discloses a sales force automation tool with an administration subsystem that allows a user to be assigned access and manages the administration of the users. It is well-known in the art that administrators via an administration system can assign and delete access rights to systems. Therefore, it would have been obvious to one of ordinary skill in the art at the

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time of the invention to allow the administrator by the administration subsystem to remove a user from the system and therefore, the tasks associated with that user must be redistributed, in order to increase the integrity of the data by controlling access to said data.

Claim 38 and 39 recite substantially similar limitations to claim 19 and 20, respectively, and are therefore rejected using the same art and rationale set forth above.

8. Claims 17, 22, 36, 41, and 48 are rejected under 35 U.S.C. 103(a) as being unpatentable over Johnson et al. (U.S. 6,067,525) in view of Raffel et al. (U.S. 2002/0082892).

As per claim 17, Johnson et al. teaches compiling all data related to a single customer in a single record (See column 4, lines 20-51, column 11, lines 15-20, column 13, lines 7-24, column 27, lines 40-50). However, Johnson et al. does not teaches resolving a duplicate record.

Raffel et al. discloses determining if a duplicate record exists and resolving how to handle such a duplicate record (See paragraph 0095).

Johnson et al. discloses maintaining customer data by the system and synchronizing the distributed data of all the remote databases of the sales force automation system. Resolving duplicate records is well-known in database management and is disclosed in a network-based sales force automation tool of Raffel et al. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to resolve duplicate data in the databases of Johnson et al. in order to more accurately interact with the customer by ensuring that the data of the system is up to date since no other duplicate data is used.

As per claim 22, Johnson et al. discloses importing multiple records from an external source (See column 4, lines 24-41, column 23, lines 30-45, and column 24, lines 5-25 and 36-45,

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wherein records are imported from an external source, such as an external database or a purchased database). However, Johnson et al. does not expressly disclose that importing includes creating a file import map within the parameters of the database.

Raffel et al. discloses a network-based sales force automation tool that includes the functionality of mapping and importing to a file (See paragraph 0068 and claims 7 and 40, which disclose mapping fields to a file).

Johnson et al. discloses importing multiple records from an external source to a single record in a database. Using a file import map to aide in the synchronization of the data is a well-known import technique and is disclosed in a network-based sales force automation tool by Raffel et al. It would have been obvious to one of ordinary skill in the art at the time of the invention to use a file import map in the system of Johnson et al. in order to allow the system to more efficiently exchange data and provide for maximum usability of the data through uniform formatting. See column 24, lines 5-15 and 30-50, of Johnson et al.

Claim 36 recites substantially similar limitations to claim 17 and is therefore rejected using the same art and rationale set forth above.

As per claim 41, Johnson et al. discloses importing multiple records from an external source (See column 4, lines 24-41, column 23, lines 30-45, and column 24, lines 5-25 and 36-45, wherein records are imported from an external source, such as an external database or a purchased database). However, Johnson et al. does not expressly disclose using an import map to facilitate said import of records.

Raffel et al. discloses a network-based sales force automation tool that includes the functionality of mapping and importing to a file (See paragraph 0068 and claims 7 and 40, which disclose mapping fields to a file).

Johnson et al. discloses importing multiple records from an external source to a single record in a database. Using a file import map to aide in the synchronization of the data is a well-known import technique and is disclosed in a network-based sales force automation tool by Raffel et al. It would have been obvious to one of ordinary skill in the art at the time of the invention to use a file import map in the system of Johnson et al. in order to allow the system to more efficiently exchange data and provide for maximum usability of the data through uniform formatting. See column 24, lines 5-15 and 30-50, of Johnson et al.

As per claim 48, Johnson et al. discloses importing multiple records from an external source (See column 4, lines 24-41, column 23, lines 30-45, and column 24, lines 5-25 and 36-45, wherein records are imported from an external source, such as an external database or a purchased database). However, Johnson et al. does not expressly disclose using import map to convert a format of said external source to said database.

Raffel et al. discloses a network-based sales force automation tool that includes the functionality of mapping and importing to a file (See paragraph 0068 and claims 7 and 40, which disclose mapping fields to a file).

Johnson et al. discloses importing multiple records from an external source to a single record in a database. Using a file import map to aide in the synchronization of the data is a well-known import technique and is disclosed in a network-based sales force automation tool by Raffel et al. It would have been obvious to one of ordinary skill in the art at the time of the



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invention to use a file import map in the system of Johnson et al. in order to allow the system to more efficiently exchange data and provide for maximum usability of the data through uniform formatting. See column 24, lines 5-15 and 30-50, of Johnson et al.

9. Claims 50 and 56 are rejected under 35 U.S.C. 103(a) as being unpatentable over Johnson et al. (U.S. 6,067,525) in view of Srinivasan (U.S. 5,548,506).

As per claim 50, Johnson et al. teaches providing a personal schedule for a user of the database (See column 19, lines 48-67, and column 20, lines 45-67, which disclose a personal management component that allows a user to create a personal schedule with associated tasks). However, Johnson et al. does not expressly disclose reminders associated with this schedule.

Srinivasan discloses task reminders being sent to a user when a task is nearing its scheduled deadline (See figure 6, column 5, lines 40-50, column 6, lines 10-15, and column 7, lines 55-61, which disclose a remind function).

Johnson et al. discloses a self-management component to the system, wherein the user can efficiently manage his/her schedule of tasks. Srinivasan discloses a remind function in a task management system that sends a user a reminder to complete a task in order to complete an overall project in a timely manner. Sending reminders to a user is well-known in scheduling software. Therefore, it would have been obvious to one of ordinary skill in the art at the time of the invention to send a reminder the user of Johnson et al. in order to enhance the salesperson's ability to manage multiple tasks and events at the same time. See column 20, lines 45-67, of Johnson et al.

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Claim 56 recites substantially similar limitations to claim 50 and is therefore rejected using the same art and rationale set forth above.

### ***Conclusion***

The prior art made of record and not relied upon is considered pertinent to applicant's disclosure.

Verba et al. (U.S. 6,236,977) teaches a marketing system that maintains data about populations of users and processes this data to identify campaigns.

Melchione et al. (U.S. 5,930,764) discloses leads targeted for a sales effort and storing information concerning this lead as well information concerning products/services in a central database. The system targets customers, such as leads, and tracks the success.

Wilkins et al. (U.S. 6,868,389) discloses a lead generation system that maintains data about a potential future purchaser and maintains a profile database.

Hayashi (U.S. 6,349,287) teaches a workflow manager that manages workflow associated with a task.

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Beth Van Doren whose telephone number is (571) 272-6737.

The examiner can normally be reached on M-F, 8:30-5:00.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Tariq Hafiz can be reached on (571) 272-6729. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

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Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free).

*lwd*  
bvd

January 23, 2006

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